# ***CUSTOMER RELATIONSHIP MANAGEMENT - CALL CENTERS IPT LAUNCH MEETING -- MAY 31, 2000***

**Participants**

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## ***BREAK-OUT SESSION RESULTS***

**Hopes/Expectations**

- One call does it all
- Timely, accurate data to anyone
- Expertise seamless to customer in one minute of less
- System does not get dropped
- We are confident in our system and can track calls
- Ability to answer call quickly – from time of pick-up of call and also quick hand-offs
- Be able to talk to a person (expanded business hours)
- Tell customer in beginning what wait time will be
- Better teamwork
- Process easier for students
- Keep focus on students
- Eliminate maze
- Seamless escalation process
- Addressing all points of contact
- Begin contact with customers early
- Create an operation that the public will feel comfortable calling for the service they need
- Solicit input from all current players and look for "Best Practices" there
- Figure out a way to share knowledge so that questions can be answered
- Work will make a difference – better
- Will not take too long to implement
- Set realistic expectations
- Achieve a level of simplicity
- Make it easier for students to get financial aid
- Start to increase a level of trust between front and back lines
- Ensure that solutions are fully implemented
- Minimal menu options
- Immediately able to indicate if want callers want a person or the menu options
- Expectation of friendly service (let the customer hear the smile)
- Wide variety of ways to make contact
- Phone representatives who are listening
- Not entering account number twice
- World class customer service comparable to best in business – metrics
- Customer service representatives understand bigger picture and where they are in the process
- Reporting by the team is in a standard format every time
- One call does it all (80/20)
- Timely access to correct data
- Accurate data
- Systems compatibility/support
- Consistent answers
- Consistent terminology
- Comprehensive training
- On call enterprise wide

- Qualified staff
- Teams use standard language – everything means the same to everyone

**Issues/Concerns**

- Keep reasonable amount of talk and be able to follow-up
- Tracking system
- Interaction between people divulging information
- Proper involvement across channels and partners
- Training – how to use system; how to answer questions
- Doing business in different way requires paradigm shift
- Establishing communications with our partner on how we can do it better
- Setting right performance measures across board
- Variety within current infrastructure
- Employees leaving due to uncertainty
- Improved service leads to more contacts which leads to more costs
- Measuring success
- Contractual issues / obligations
- Implementing "one call does it all"
- Choosing benchmarking industries
- Tracking communication across systems – before something becomes a problem
- Customer satisfaction survey at end of call
- Soft transfer - we stay with customer until hand-off completed
- Ability to provide conference calls across centers
- Availability of data for management and customers
- Security of data
- Wide variety of current environment and moving to a new mindset
- Confidentiality / privacy
- Systems security plan
- We must have "listening in" ability for monitoring incoming calls and that it not be misconstrued as a disciplinary or evaluation of the individual. The team needs to ensure it is seen as a way to reach the customer satisfaction goals.
- Complexity of financial aid process
- Aware that some things are driven by Congress – limitations
- Contracts are too limited … tie hands of common sense – remove redundancy
- Silos – SFA, Contractors, Congress
- SFA does not impose inordinate rules on contractor operations
- Lines of communication need to remain open
- Can "one call does it all" work
- Money is a concern
- Involvement of everybody
- Reasonable amount of time for training and transition
- Keep current service levels during transition
- Keep regional offices in loop
- Calls "free" or charge per call

**Advice/Recommendations**

- Include lenders as stakeholders (FFEL community)
- Look at lender tracking best practices
- Assure that there are standards for our service representative, i.e. identify themselves, ask what assistance can I give you, instill that the person who gets the call resolves it, assuring that customer is satisfied and that progress is made
- Being able to suggest alternatives
- Abandon preconceptions
- Define a common terminology
- Look for alternative to call centers
- Provide medium for suggestions (interaction through inter / intra net)
- Look at Quick Hits that go beyond September
- More sharing of knowledge across locations, programs, companies
- Form cooperative teams of business experts – hear concerns and opinions from all players
- Let the contractors solve the problem
- Contractors hired to do the basic business…let them do it
- Identify interfaces between contracts that cause the most problems for the customer
- On-line tutorials for CSR's…learning different contractor business
- Consistency of basic CSR skills
- Core team proportionately represent all channels
- Include students throughout process – focus groups
- Also schools, servicers, and lenders
- Tight involvement with CIO's
- Authority to implement recommendations
- Whatever team on – goals, definitive steps, and order of steps
- Provide demonstration of potential software or potential options
- Communication tight with core team members and sub-teams
- Once the system is determined / purchase early
- Make sure technology works with external partners
- Compatibility of systems
- Qualified, courteous, knowledgeable staff
- Past current status
- Maximum use of technology
- Understand costs breakdowns
- Breadth of CRM should, include "all" contact with customers (internal, external, employees, contractors, partners)
- Use CRM data to understand sand service customers better (use data effectively)
- Phased implementation (less impact / easier implementation, control risk)

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| • Included by phone conference on significant issues | • Include more regional people |
| • Getting input from everyone, actively involved | • Big group – so give a sense of who is in the room |
| • Right people in the room | • Bigger room |
| • Including contractors | • Look into virtual meetings so more people can contribute |
| • Participative format | |
| • Big picture in beginning | |
| • Remote access worked and ability to give input | |
| • Appreciate team approach without distinction in roles | |

**Volunteers**

| Name | Email | Phone | Sub-Team | Level of Participation |
|---|---|---|---|---|
| Steve Penyak | Steve.Penyak@acs-gsg.com | (301) 212-8002 | | Give input |
| Daria Adams | Daria_Adams@ed.gov | (202) 205-3454 | Quick Hits | Quick Hits – Full-time<br>Give Input to other teams |
| Varlerie Sherrer | Vsherrer@ed.gov | (202) 260-5333 | Best Practices | |
| Ken Faison | Kenneth.Faison@ed.gov | (202) 205-0548 | Current State | |
| Sue Szabo | Sszabo@afsa.com | (315) 738-6692 | Quick Hits | Quick Hits – Full-time<br>Give Input to other teams |
| Marilyn LeBlanc | Marilyn_Leblanc@ed.gov | (202) 205-3364 | Best Practices or Quick Hits | Give Input |
| Diane Clark | Diane_Clark@ncs.com | (319) 339-6602 | | Will give input to any / all teams |
| Scott Reynolds | Scott_Reynolds@ncs.com | (785) 838-2102 | | Will give input to any / all teams |
| Chris Ledman | Chris_Ledman@ncs.com | (703) 284-5610 | Quick Hits | Full-time |
| Mary Westbrook | Mary_Westbrook@ncs.com | (319) 339-6401 | | Provide inventory of PIC, CPS, WAN, CRM work<br>Provide input and other resources as needed by all sub-teams |
| Chris Hill | Chris_Hill@ed.gov | (202) 708-8460 | Current State | Full-time |
| Vincent Ferrer | Vincent_Ferrer@ed.gov | (202) 260-6515 | Best in Business | Full-time |
| Dan Opperman | | San Francisco | Best in Business | |
| Barbara Anderson | Barbara.Anderson@eds.com | (502) 326-2010 | Each sub-team | Full-time (initial point of contact at EDS to ensure that the proper EDS representative is on each team) |
| Paul Steinhauer | Steip@ncs.com | (785) 838-2118 | Best Practices | Full-time |
| Rick Windham | Richard.Windham@ac.com | (612) 860-8793 | Best Practices | Full-time |
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